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EMBRACING THE OUTBOUND TRAVEL EXPERIENCE

Chinese Traveler Sentiment Report

Dragon Trail Research   **September 2024**

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Introduction: As the market continues to recover, Chinese outbound travelers are ready to experience more from their trips

By the end of summer 2024, Chinese outbound travel has not yet reached pre-pandemic levels for most destinations. But any way you choose to measure it – international flight volume, outbound bookings on Chinese OTAs, visa applications, car rentals, tax-free shopping – recovery is still very much on track, with significant year-on-year gains.

Dragon Trail's newest survey of 1,025 Chinese travelers, conducted between 12-20 August 2024, also reflects this continued upward trajectory. Last year at this time, only 4% of survey respondents had already traveled outbound during the year to date. This year, 16% had traveled outside of mainland China already in 2024 – and 60% of this group had made at *least* two outbound trips.

We also see some welcome stabilization in traveler sentiment. During and immediately following the pandemic years when China was closed to outbound travel, our surveys regularly uncovered wild fluctuations in safety perceptions for outbound destinations. The results this time have none of that same volatility, with most changes just by a few percentage points in one direction or the other. When asked about interest in traveling to various world regions, interest increased for 10 out of 11 regions compared to our spring survey, with the 11th region (Southeast Asia) receiving the same high rating as in our last survey.

This stability and growing interest in outbound regions supports Chinese travelers' stated reasons for traveling abroad: Relaxing (47%) and exploring different scenery and cultures (41%). We also see that Chinese outbound tourists are extremely active, with 70% having attended an event or taken part in a cultural activity while traveling abroad, including pop concerts, dance performances, major sporting events like the Olympics, fireworks displays, and museum exhibitions. In 2024, live events are definitely back and driving travel around the world, no less from the Chinese market.

Looking forward, we expect an October Golden Week that will come closer than any previous Chinese holiday period since the country's reopening to meeting pre-pandemic levels. Nearly 40% of our survey respondents who are planning to travel in the rest of 2024 say they will do so in October.

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Chinese traveler survey findings:
Our 6 top takeaways from the report

1) **Chinese travelers are making significantly more outbound trips than last year**
Our survey data reflects a market that has made substantial progress since this same time last year. As of August 2024, 16% of survey respondents had already taken an outbound trip, and another 17% had an outbound trip booked, compared to just 4% and 9% at this time last year. Of those who have already traveled outbound in 2024, 60% have taken *at least* two outbound trips.

2) **Travel motivations are diverse, with high interest in events and cultural activities**
Chinese tourists' purposes for traveling outside of mainland China span a broad spectrum ranging from nature, arts & culture, and sporting activities. Notably, 70% of outbound travelers had previously attended an arts or sports event or participated in a cultural activity on an overseas trip.

3) **Chinese consumers are seeking discounts and promotions, while allocating extra budget to food and drink, and entertainment**
Around half of survey respondents budget between RMB10k-30k for their next outbound trip. Numerous survey questions – ranging in topic from cruise travel to destination information to hotel loyalty programs – highlight how Chinese consumers are seeking out discounts and promotions when planning outbound travel. Where are they willing to splurge? Food and drink is the most popular category for increased spending (76%), followed by fun and activities (66%).

4) **Europe continues to stand out for long-haul travel, but interest in almost every world region has grown**
Asia is the world region visited by 80% of survey respondents on their most recent outbound trip in 2024, and the destination for 65.9% of those who are planning trips for the rest of the year. For long-haul travel, Europe stands out, with survey respondents planning to visit a total of 28 European countries. However, interest in traveling to nearly every world region has grown since our spring survey – and the only exception, Southeast Asia, has maintained its previously high rating.

5) **Xiaohongshu continues to lead as the top destination information channel**
Once again, Xiaohongshu tops the list of information channels for overseas travel destinations, with 57% of consumers choosing it, up from 52% in the spring. Chinese travelers show strong interest in practical content and UGC tips, in addition to promotions, favorable travel policies, and itinerary recommendations.

6) **AI's future in tourism could be language translation and itinerary planning**
Currently, Chinese travelers have a reserved attitude towards the usefulness of AI in improving their travel experiences. Where is the potential for the future of AI + travel? Survey respondents said they hoped AI could help them optimize their trips through language translation and itinerary planning tools.

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Photo by Te lensFix from Pexels

China's outbound travel market in 2024

Entering the second half of 2024, what changes have taken place in China's outbound travel market and what should overseas destinations or businesses expect for the remainder of the year? Our survey results reveal Chinese tourists' recent trips and plans for outbound travel in 2024, destinations that they have visited or are on their wishlists, their motivations for traveling abroad this year, and how they plan their outbound trips.
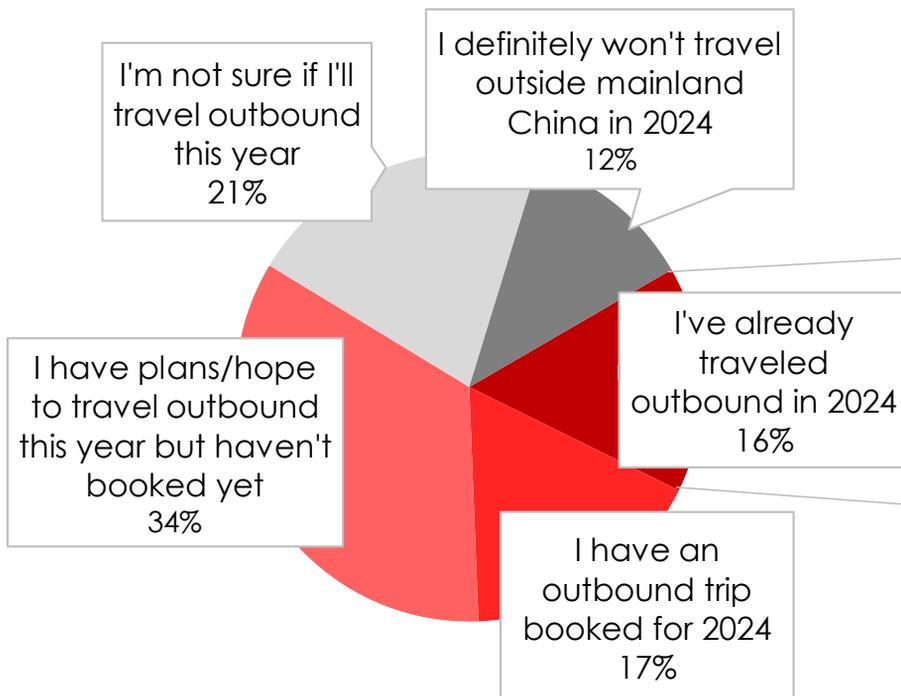
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Two thirds of survey respondents have traveled outbound or have trips planned for 2024

As of August, more than two thirds (67%) of survey respondents have either traveled or plan to travel outbound during this calendar year. 16% had already taken at least one outbound trip. This is much higher than the numbers in March 2024 (5%) and August last year (4%). Among these 160 travelers, 60% of them had already taken two or more trips outside of mainland China this year. Chinese consumers' intention to travel outbound remains significant for the rest of the year, with 17% of total respondents having an outbound trip already booked, and 34% hoping to travel outbound this year but with no bookings yet. We expect October, with China's National Day Golden Week holiday, to be the peak season of outbound travel for the remaining months of 2024 (see appendix A).

In our August 2023 survey, over 50% of respondents were undecided on their outbound travel plans or definitely wouldn't travel outbound that year. One year later, only 21% were unsure about their plans and 12% said they definitely won't travel abroad this year.

Have you traveled outside of mainland China in 2024?
N=1025

I'm not sure if I'll travel outbound this year
21%

I definitely won't travel outside mainland China in 2024
12%

I have plans/hope to travel outbound this year but haven't booked yet
34%

I've already traveled outbound in 2024
16%

I have an outbound trip booked for 2024
17%

Number of outbound trips taken in 2024
N=160

11.9%
4+ trips

13.8%
3 trips

34.4%
2 trips

40%
1 trip

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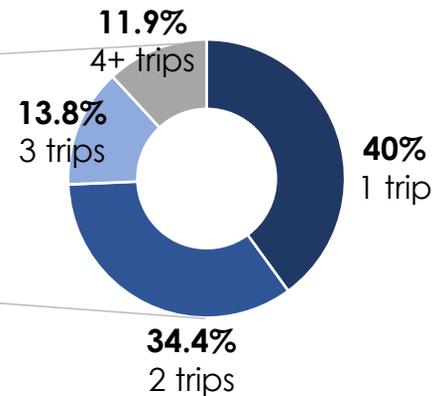
Greater China, South Korea, Japan, and Thailand lead among outbound destinations

We asked survey respondents who had traveled outside of mainland China this year which outbound destination they had last visited. The Greater China destinations of Macau and Hong Kong were most popular, followed by South Korea, Japan and Thailand. These five destinations also ranked highest for future bookings or travel plans in 2024. The most popular long-haul destinations visited already this year were Germany, France, the US, and New Zealand.

Outbound travel destinations outside mainland China in 2024

(N=160)		% Visited[1]	% repeat visit		(N=633)		% booked /plan to	% repeat visit
#1	Macau	16.3%	46.2%		#1	South Korea	12.8%	16.0%
#2	Hong Kong	15.6%	60.0%		#2	Thailand	10.6%	23.9%
#3	South Korea	13.1%	42.9%		#3	Japan	10.3%	23.1%
#4	Japan	11.3%	50.0%		#4	Macau	8.1%	29.4%
#5	Thailand	10.6%	23.5%		#5	Hong Kong	6.0%	21.1%
#6	Malaysia	5.0%	12.5%		#6	France	5.2%	21.2%
#7	Germany	3.8%	33.3%		#7	Malaysia	5.1%	21.9%
= #8	France	2.5%	50.0%		= #8	Iceland	3.9%	4.0%
= #8	Singapore	2.5%	50.0%		= #8	Singapore	3.9%	8.0%
= #10	USA	1.9%	33.3%		= #10	Australia	3.0%	31.6%
= #10	New Zealand	1.9%	33.3%		= #10	Germany	3.0%	15.8%

[1]Destination visited on respondents' most recent outbound trips in 2024

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Diverse destinations within Europe appeal to Chinese travelers planning future trips

Asia is the world region visited by 80% of survey respondents on their most recent outbound trip in 2024, and the destination for 65.9% of those who are planning trips for the rest of the year. Those trips within Asia are mostly to the destinations on the top 10 lists (see previous page), followed by the Maldives, Vietnam, Taiwan, Laos, and the Philippines.

Survey respondents had already visited 10 European countries in 2024, concentrated entirely in Western Europe with the exception of one trip to Belarus. When it comes to plans for future trips, however, the list of European countries is much more diverse, and extensive. Travelers said they were planning trips to a total of 28 European destinations, ranging from Scandinavia to the Balkans.

Outbound travel regions outside mainland China in 2024

	Asia	Europe	Oceania	North America	Middle East	Latin America	Africa
Visited on most recent outbound trip in 2024 (N=160)	80.0%	12.5%	3.1%	2.5%	1.9%	0%	0%
Booked/ Plan to visit (N=633)	65.9%	25.3%	4.3%	2.1%	1.3%	0.6%	0.6%
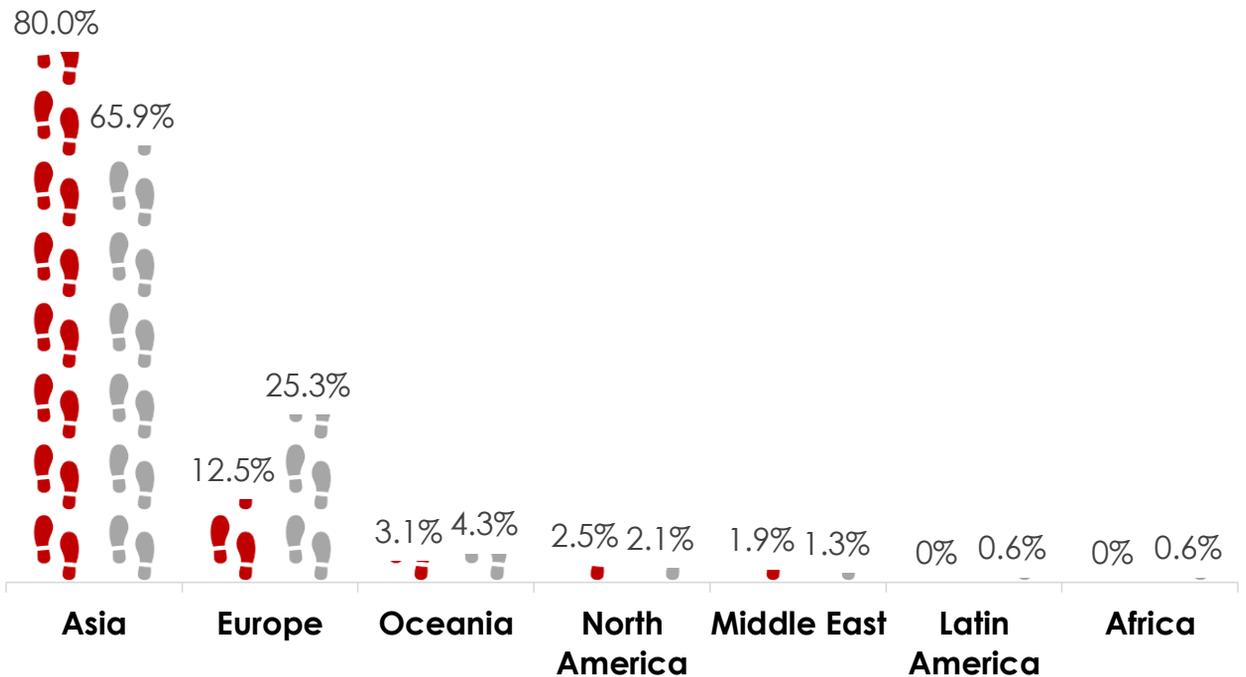
👣 Visited on most recent outbound trip in 2024 (N=160)

👣 Booked/ Plan to visit (N=633)

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Chinese outbound travelers tend to plan two months in advance, with trips lasting within two weeks

We asked survey respondents who had already taken or booked outbound trips for 2024 how far in advance they planned their trips and how long their trips lasted for. Around two thirds (64.7%) of them started to plan their outbound trips two months or less before traveling, with 34% waiting until the last month before departure, and only 5.4% planning their trips more than six months in advance. Around half (46%) of respondents stated that their outbound trips lasted for 4-7 days, with another 30% selecting 8-14 days.

How far in advance did you start planning your most recent or booked outbound trip? N=335

34%	30%	19%	11%	5%	1%	
1 month	2 months	3 months	4-6 months	7-12 months	>1 year	before trip
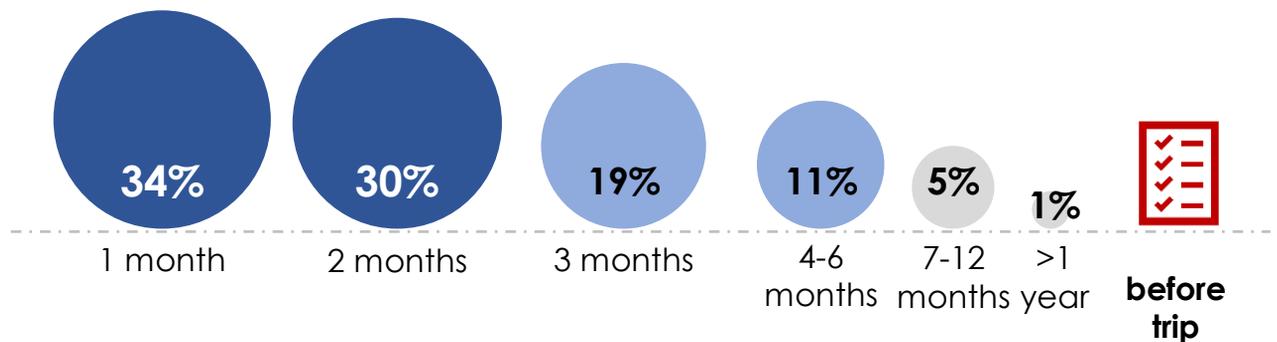
What is/was the duration of your most recent or booked outbound trip? N=335

13%	46%	30%	9%	3%	
1-3 days	4-7 days	8-14 days	15-30 days	>30 days	

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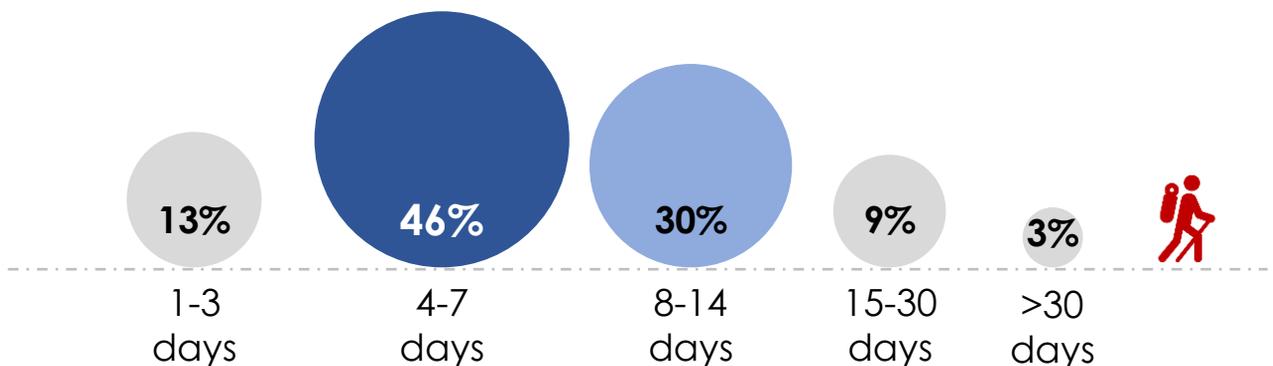
The core motivation for traveling abroad in 2024 is to relax and unwind

To relax and unwind is survey respondents' top outbound travel motivation in 2024 (47%). Exploring different scenery and cultures is another leading reason, chosen by 41% of survey respondents. One-third of travelers said they traveled outbound in 2024 to enjoy life, pursuing a high-quality travel experience.

Why do you travel outbound in 2024? (N=687)

47%
Relax and unwind

41%
Explore different scenery and cultures in the world

32%
Enjoy life, pursue a high-quality travel experience

21%
Travel with family and friends to promote bonding

19%
Broaden my horizon for self-improvement

8%
Take on challenges, seek out new experiences and adventures

7%
Get away from the crowd to recharge

6%
Celebrate and reward achievements

Photos from Unsplash

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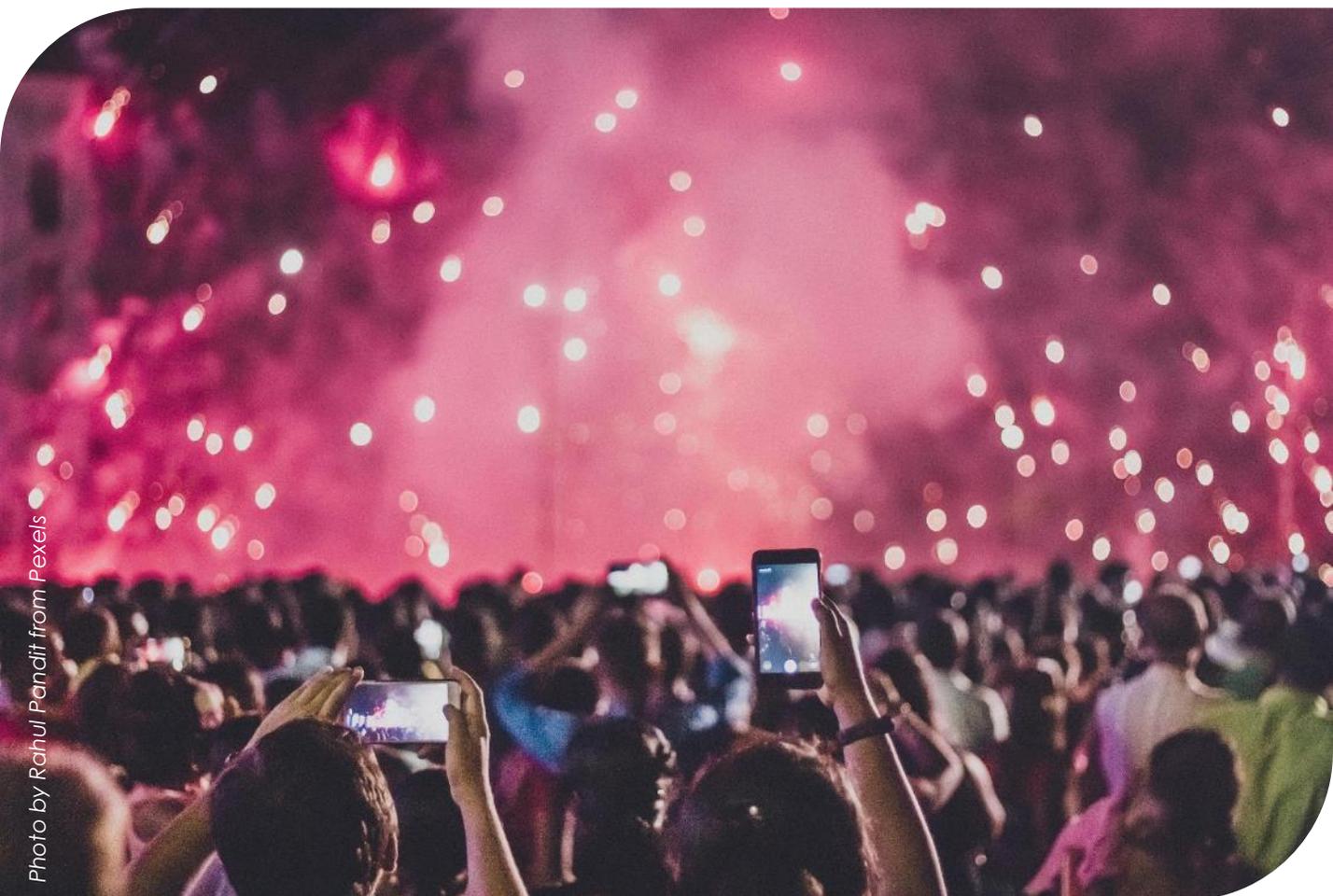
Photo by Rahul Pandit from Pexels

How Chinese travelers explore the world today

As Chinese tourists are showing increasing demands for immersive and personalized experiences in outbound travel, we explored the diverse activities that they have engaged in during their outbound trips. In addition to cultural events and activities, we took a closer look at niche travel segments, including cruise travel and self-driving.

This section will also help you to better understand travel behaviors and preferences for outbound travel booking, budgets, payments, and hotel loyalty programs.

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Chinese tourists engage in diverse spectrum of activities when they travel abroad

Chinese tourists' purposes for traveling outside of mainland China span a broad spectrum ranging from nature, arts & culture, and sporting activities. 51% of survey respondents said they had previously traveled outbound to visit national parks or zoos, with another 51% going on city tours. Museums & cultural exhibitions (37%), featured festival events such as fireworks shows (36%), theme parks (35%), and music performances (33%) also represents significant attractions for Chinese travelers.

Have you ever traveled outbound for the following type of event/activity? (N=524)

① National park/ zoo, 51%
Marine life watching, 29%
Camping, 28%
Eco-protection, 27%
Safari, 6%

NATURE 76%

Water sports, 31%
Outdoor adventure, 30%
Air experience (e.g., skydiving), 23%
Winter sports, 20%
Attend a sports event, 17%

SPORTS 69%

③ Museums & cultural exhibitions, 37%
④ Featured festival, 36%
⑥ Music performance, 33%
Art performance, 21%

ARTS & CULTURE 65%

② City tour, 51%
⑤ Theme park, 35%
Visit filming location, 23%
Self-drive tour, 22%
Education, 22%
Wellness, 18%
Cruise, 17%
Self-healing, 12%

OTHERS 88%

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Deep dive: Arts & culture activities and sports events overseas

A total of 70% of surveyed outbound travelers had previously attended an event or participated in a cultural activity while on an overseas trip. From visiting museums or watching operas in Europe to attending fireworks festivals in Japan and Hong Kong and going to the 2024 Paris Olympics, their answers once again demonstrate the diverse and personalized motivations behind Chinese travelers' outbound travel choices.

What event or cultural activity did you participate in during your past outbound trips? (N=368)

New Year's Eve fireworks display · Cheer Chen concert · Portland Street Food Festival, Hong Kong · Canada International Dragon Boat Festival · BLACKPINK concert · Songkran Festival, Thailand · Macau International Fireworks Display · Leeum, Samsung Museum of Art · Horse racing, Berlin · Joker Xue concert · JJ Lin concert · League of Legends World Championship · Macao International Music Festival · Qatar 2022 World Cup · SUMMER SONIC 2024 · Asian Games · Singapore Art Museum · Water Festival · The Edinburgh International Festival · Coldplay concert · the Louvre Museum · Arts show in Vienna · UEFA Euro · 2022 World Cup · Angela Zhang concert · cello performance · Palace of Versailles · Thailand National Museum · Bullfighting, Spain · MayDay concert · Classical Music Piano Concert · Victoria Harbour pyrotechnic display, Hong Kong · Olympics table tennis · 2024 Paris Olympics · Hong Kong Palace Museum · Museum of Fine Arts, Boston · 2016 Rio Olympics · The Great Gatsby Immersive Experience, London · 2024 Jangsaengpo Hydrangea Festival, South Korea · Bigbang concert · AAA music words · Tokyo Olympics Opening Ceremony · Taylor Swift concert · AESPA concert · Japanese dance · Cai Xukun concert · Studio Ghibli Symphony Concert · 2021 Bangkok musica festiva · Bundesliga · PP concert · Frankfurt Book Fair · G.E.M.concert · (G)I-DLE concert · Sendai Tanabata Festival, Japan · Rene Liu concert · moonbyul 1st world tour museum: an epic of starlit · Kpop · NBA · Olympics table tennis · Hong Kong Museum of History · Food Festival, Thailand · Jay Chou concert · Premier League · Fireworks Festival, Japan · Jacky Cheung · World Cup Qualification · Tokyo Festival · Macau Grand Prix · super junior · Singapore HeritageFest · Hong Kong Railway Museum · Henry Lau concert · Light Festival · Tokyo Olympics · concert at Hong Kong Coliseum · live house · local musical festival · British Museum · Asian Cups · Kpop · 2023 World Cup · Tokyo Marathon · Macau Fountain Performance · Beyoncé · Opera in London · Ethnic Music Concert · Australian Open · Andy Lau concert · The Atami Fireworks Festival, Japan · Nogizaka46 concert · G.E.M.concert · Royal Ontario Museum · Eason Chen concert · Busan 2024 World Team Table Tennis Championships, South Korea · Aaron Kwok concert · Christmas Fireworks display, Hong Kong · Paris Olympics

- 🟥 Museums & cultural exhibitions
- 🟩 Featured festival events
- 🟦 Music performances
- 🟥 Art performances
- 🟨 Sports events

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Price matters more than any other factor when it comes to cruise travel

Among the survey respondents who had previously traveled outside of mainland China for the purpose of taking a cruise, more than half (52%) said that budget and pricing were one of the most important aspects when considering cruise travel products. This was by far the most popular choice, outranking dining (39%), cabin and ship facilities (37%) and onboard entertainment (36%). Chosen by just 32% of respondents, the cruise's itinerary/destination was actually not a leading factor. This result underscores the importance of deals and promotions when it comes to marketing cruise travel to a Chinese audience.

What aspects are most important to you when considering cruise travel products? (N=87)

- Budget and pricing, 52%
- Dining experience, 39%
- Cabin and facilities, 37%
- Onboard entertainment, 36%
- Service quality, 35%
- Itinerary/destinations, 32%
- Shore excursion, 23%
- Cruise line/brand, 18%
- Departure Port, 12%

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Urban and highway trips are most popular for Chinese self-driving travelers abroad

As Chinese travelers increasingly favor more immersive and localized outbound travel experiences, the demand for car rental and self-driving trips continues to grow. Outbound self-driving travelers are most likely to drive in urban areas, chosen by 58%. Highway self-driving is another popular self-drive option, chosen by 47% of respondents. Coastal/Island routes also attract 38% of self-drivers.

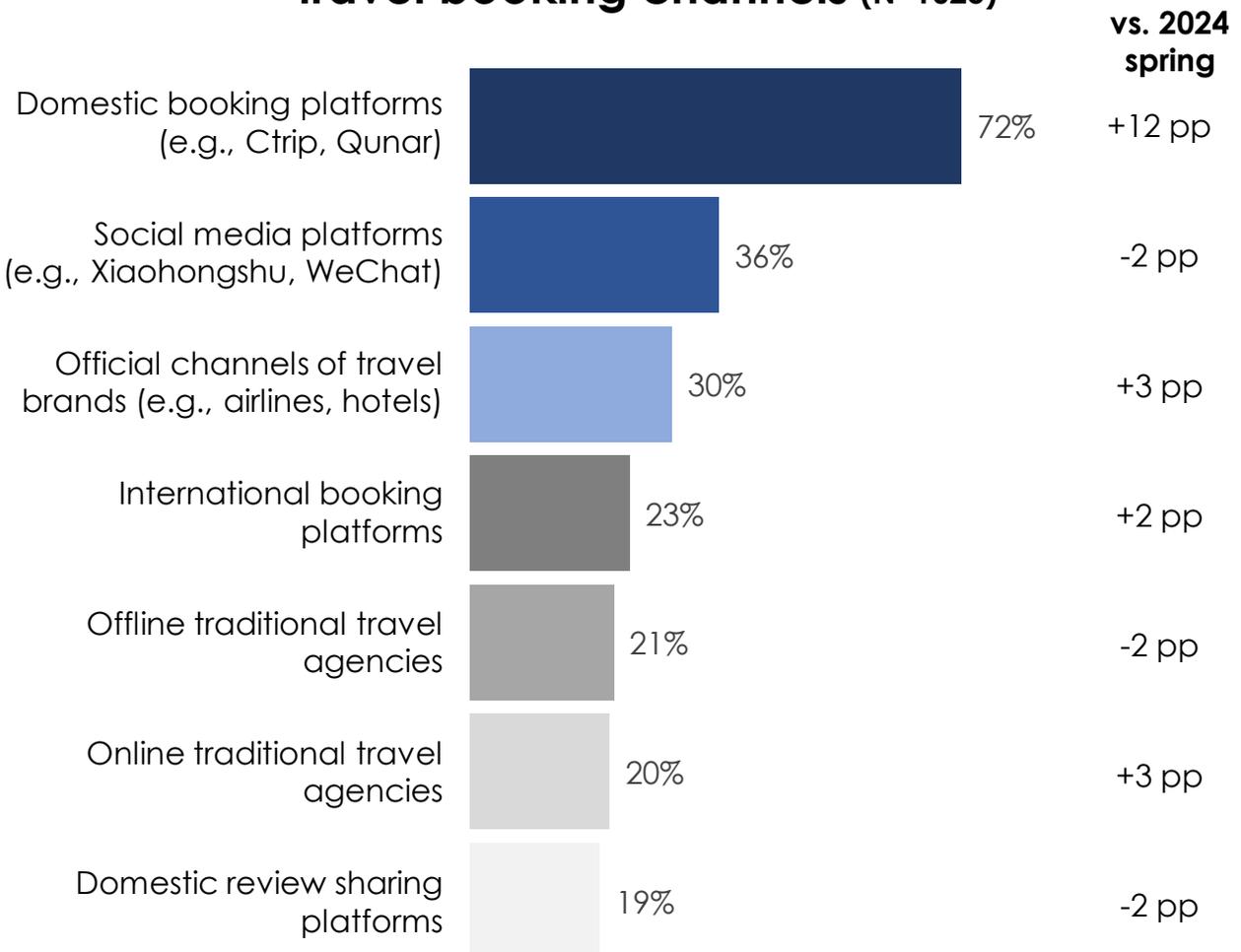## Which of the following types of self-drive tours have you ever taken on outbound trips? (N=116)

58%
Urban self-driving

47%
Highway self-driving

38%
Coastal/Island self-driving

28%
Rural self-driving

13%
Motorcycle self-driving

Multi-country self-driving, 10%
Desert self-driving, 9%

Photos from Pexels

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Chinese OTAs and social media platforms remain the most common booking channels

Compared to spring 2024, the channels used by Chinese tourists to book outbound travel itineraries and services remained consistent. Chinese online booking platforms such as Ctrip and Qunar continue to be the leading channels, with even more respondents selecting this option (72%) than in our last survey. Social media platforms such as Xiaohongshu and WeChat rank as the second most common channels for Chinese outbound travel bookings, chosen by 36% of survey respondents. Following this are official channels of travel brands such as airlines and hotels, used by 30% of respondents.

Chinese travelers: Outbound travel booking channels (N=1025)

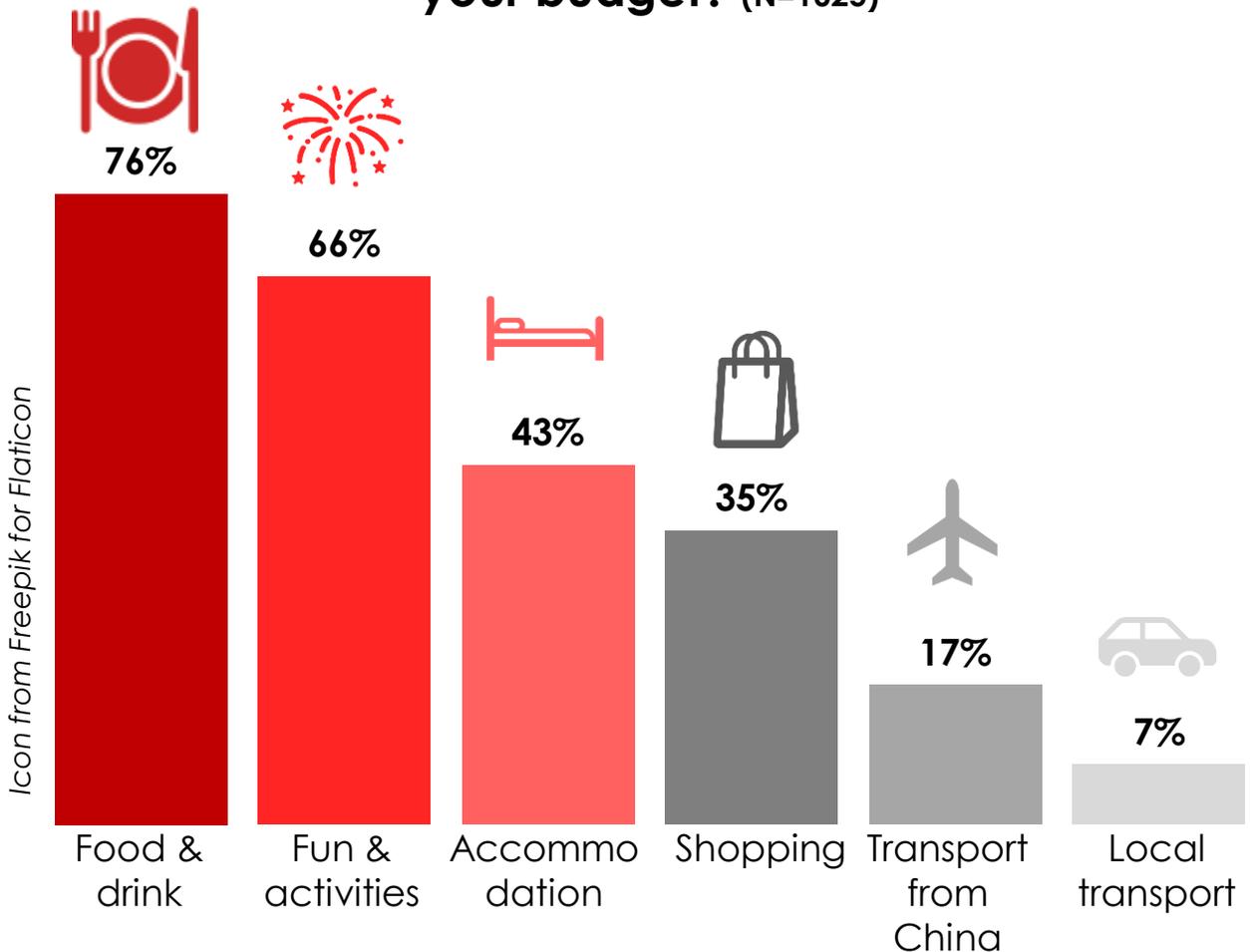| Channel	%	vs. 2024 spring
Domestic booking platforms (e.g., Ctrip, Qunar)	72%	+12 pp
Social media platforms (e.g., Xiaohongshu, WeChat)	36%	-2 pp
Official channels of travel brands (e.g., airlines, hotels)	30%	+3 pp
International booking platforms	23%	+2 pp
Offline traditional travel agencies	21%	-2 pp
Online traditional travel agencies	20%	+3 pp
Domestic review sharing platforms	19%	-2 pp

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Chinese consumers are willing to spend more on food and drink, despite limited budgets

When it comes to budgets for their next outbound trips, Chinese travelers are still most likely to spend between RMB10,000-30,000, with 49% choosing this amount in our current survey, and 47% picking it in the spring of 2024 (see data in Appendix A).

Working with a limited budget, where are the areas Chinese tourists are willing to spend more? Food and drink stands out as the first choice (76%), since trying local food is always a top theme for Chinese outbound travelers. Local entertainment and activities follow, with 66% of Chinese travelers willing to allocate more budget here.

Where would you prefer to allocate more of your budget? (N=1025)

Icon from Freepik for Flaticon

Food & drink	Fun & activities	Accommodation	Shopping	Transport from China	Local transport
76%	66%	43%	35%	17%	7%

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Cash is the most used outbound payment method, but mobile payments should not be overlooked

China has become a highly saturated market for mobile payments, but how do Chinese travelers make payments while traveling outbound? Our latest survey reveals that for Chinese tourists who have traveled beyond mainland China in the past, cash is still the most common payment method, selected by 57%. Card services such as UnionPay (55%) and Visa (41%) are also widely used. Meanwhile, Chinese mobile payment platform Alipay follows quite closely, chosen by a notable 54% of respondents and far exceeding the 35% of respondents who had used WeChat Pay on past outbound trips. Adopting Chinese mobile payment systems remains highly advisable for overseas destinations and businesses hoping to woo Chinese tourists.
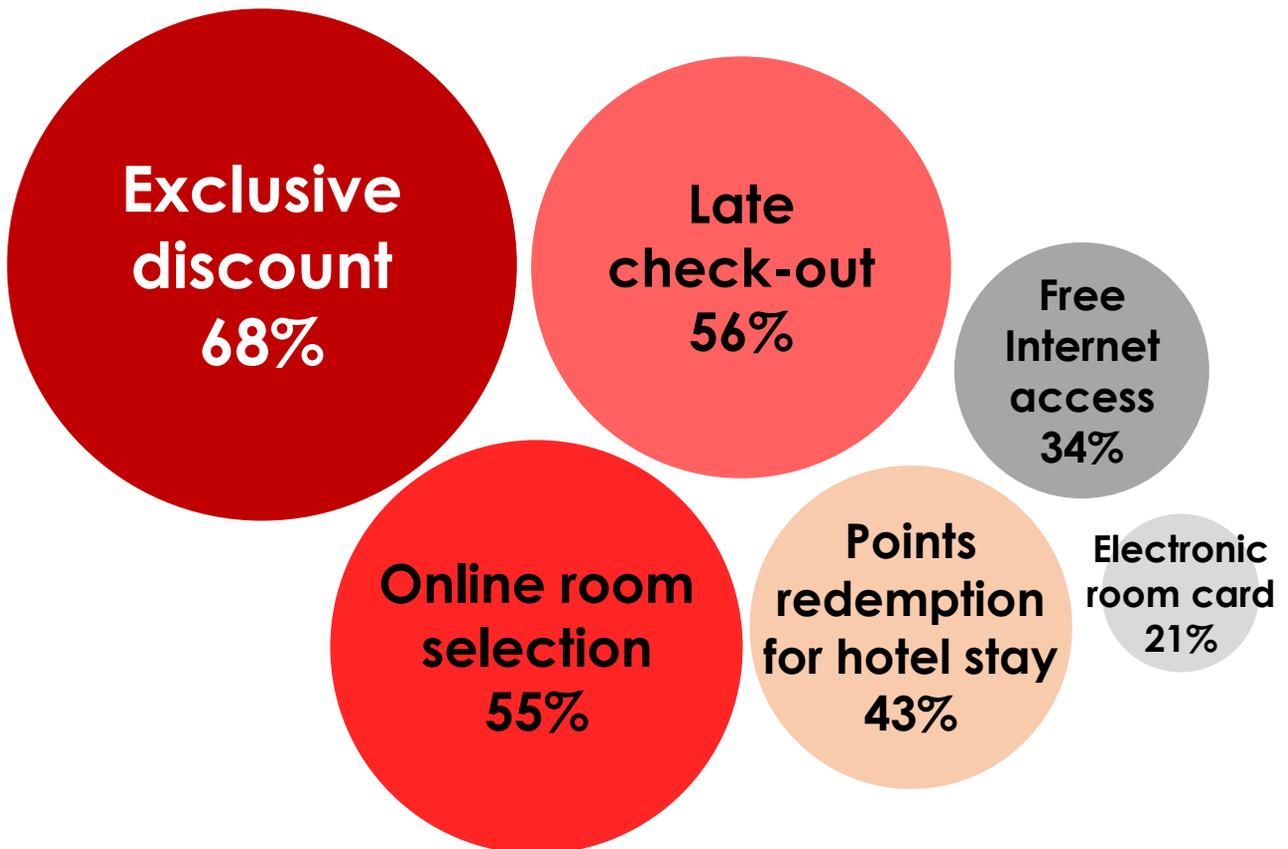
Chinese travelers: Payment methods used on past outbound trips (N=524)

Payment method	Percentage
Cash	57%
UnionPay 银联	55%
支付宝 ALIPAY	54%
VISA	41%
WeChat Pay	35%
Apple Pay	19%
mastercard	19%
PayPal	17%

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Exclusive discounts, late check-out and online room selection are attractive hotel membership incentives

Just 16% of our survey respondents are members of hotel loyalty programs (see Appendix C). However, the appeal of hotel membership incentives are similar between these loyalty members and our survey respondents who have not signed up for a hotel loyalty scheme. Exclusive discounts are no doubt the most attractive incentive for Chinese travelers to join a hotel loyalty program (68%). More than half of travelers prefer late check-out (56%) and online room selection (55%), demonstrating that simple but useful incentives are the most appealing.

Chinese travelers: attractive hotel membership incentives (N=1025)

Exclusive discount 68%

Late check-out 56%

Free Internet access 34%

Online room selection 55%

Points redemption for hotel stay 43%

Electronic room card 21%

Other mentioned incentives: early check-in, free parking, free breakfast
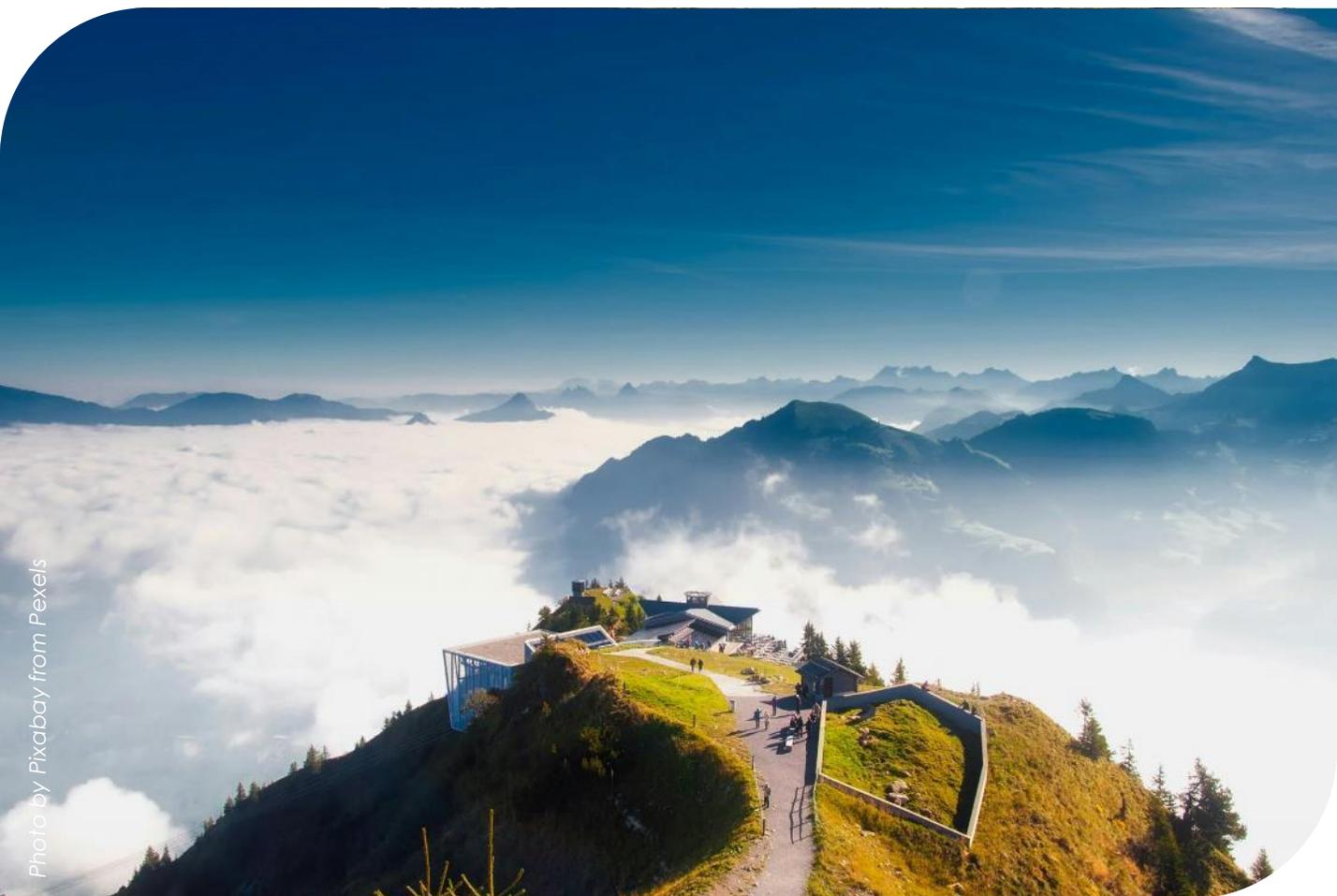
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Photo by Pixabay from Pexels

Outbound destination perceptions and marketing insights

Dragon Trail's continuous tracking of interest in and safety perceptions for overseas destinations provides the most up-to-date snapshots of consumer sentiment and outlook for the Chinese outbound tourism market.
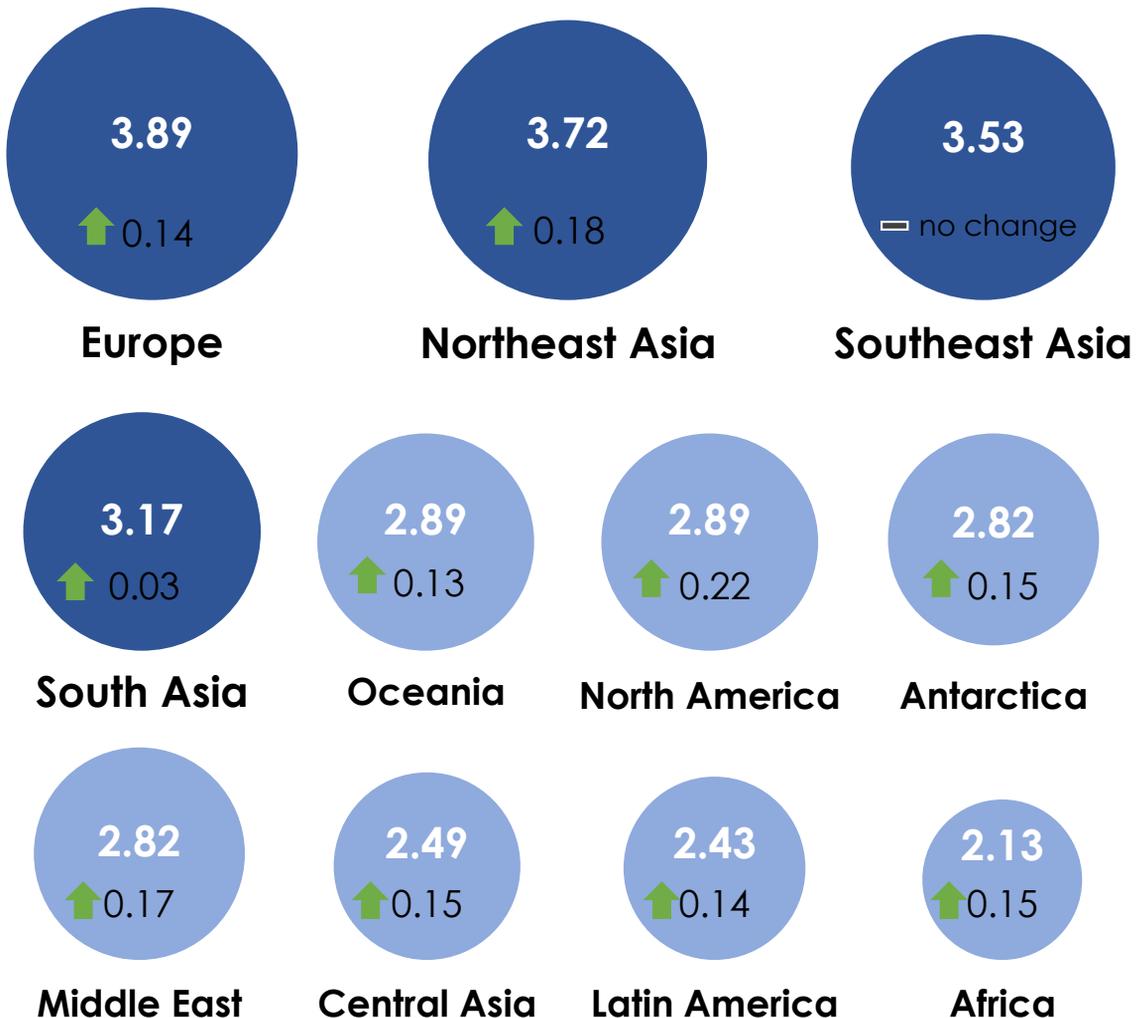
For travel brands seeking to market themselves to Chinese consumers, our survey also includes insights on their favored channels for finding outbound travel information and the type of content that most interests them. Additionally, this edition of our survey examines Chinese travelers' attitudes to the use of AI in travel.

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Interest in traveling to nearly every world region has grown in the past months

Of all the 11 world regions, only Southeast Asia saw no change in interest from Chinese travelers since our spring 2024 survey, with an increase in interest for everywhere else. North America saw the biggest increase (0.22 points) and is now tied with Oceania. Europe continues to be the most coveted world region, followed by Northeast Asia. Compared to our September 2023 survey, the Middle East has seen the biggest gain in interest, with an increase of 0.66 points from 2.16 at this time last year, to a current score of 2.82.

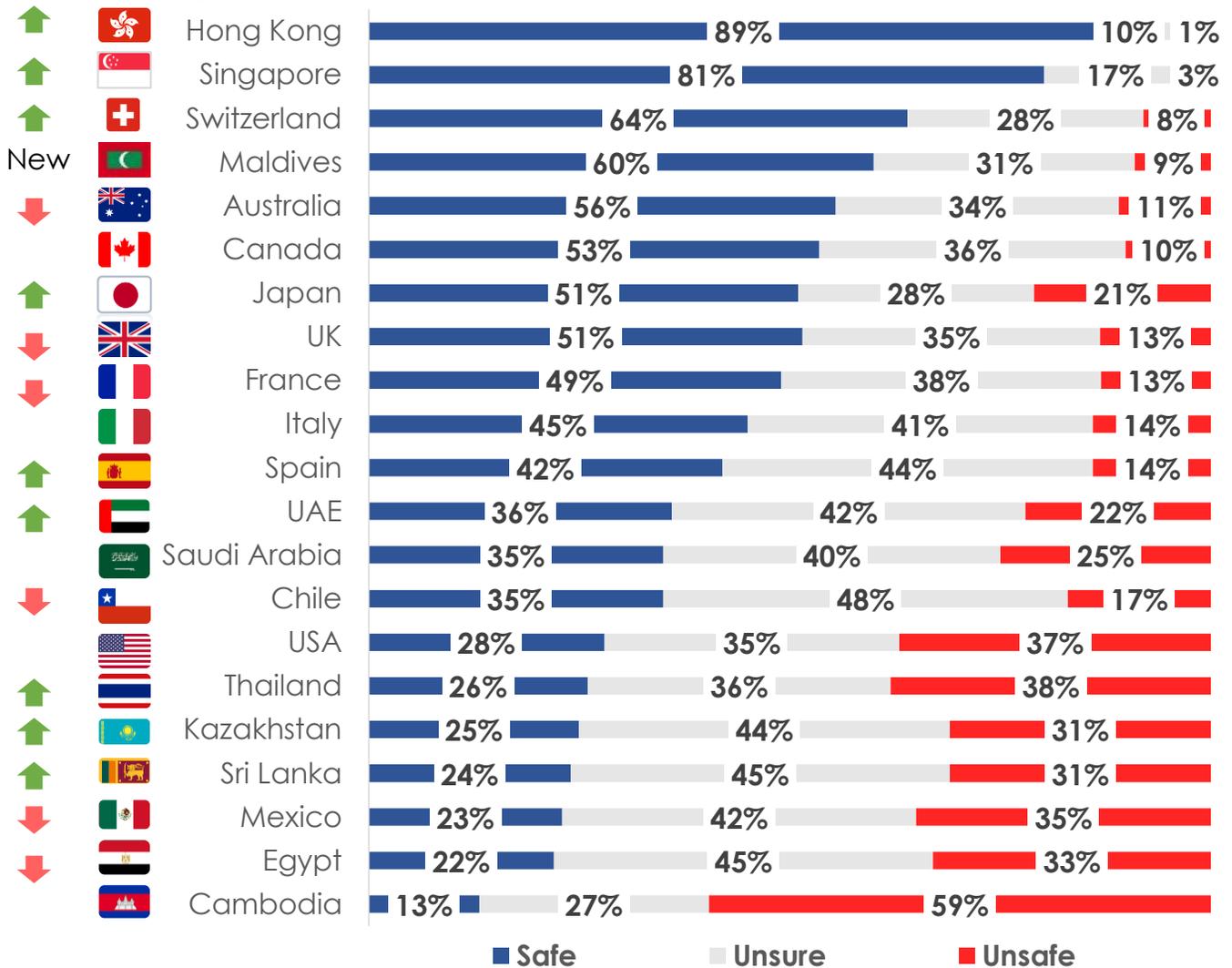## How interested are you in traveling to these areas of the world? (N=1025)

⬆ vs. 2024 spring

3.89 ⬆0.14 **Europe**	**3.72** ⬆0.18 **Northeast Asia**	**3.53** — no change **Southeast Asia**
3.17 ⬆0.03 **South Asia**	**2.89** ⬆0.13 **Oceania**	**2.89** ⬆0.22 **North America**
2.82 ⬆0.17 **Middle East**	**2.49** ⬆0.15 **Central Asia**	**2.43** ⬆0.14 **Latin America**

2.82 ⬆0.15 **Antarctica**

2.13 ⬆0.15 **Africa**

*Average score between 1-5, with 5 being extremely interested

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Hong Kong, Singapore, and Switzerland are still seen as the safest outbound travel destinations

Changes in the safety perceptions for outbound travel destinations since spring 2024 were not as dramatic as the fluctuations during and directly after the pandemic years, with most changes within just a few percentage points. Hong Kong, Singapore, and Switzerland remain the top three "safest" destinations, each improving its rating slightly. The UK fell from 4th place to 8th, and from 55% "safe" to 51%. Japan's reputation continues to recover after a drop last year, and Kazakhstan is the most improved destination, with just 51% rating it as "unsafe", down from 59% in the spring. New to our list, the Maldives debuts just below Switzerland, seen by 60% of travelers as "safe".

How safe is it to travel to the following destinations?

vs. 2024 spring

		Safe	Unsure	Unsafe
↑	Hong Kong	89%	10%	1%
↑	Singapore	81%	17%	3%
↑	Switzerland	64%	28%	8%
New	Maldives	60%	31%	9%
↓	Australia	56%	34%	11%
↓	Canada	53%	36%	10%
↑	Japan	51%	28%	21%
↓	UK	51%	35%	13%
↓	France	49%	38%	13%
↓	Italy	45%	41%	14%
↑	Spain	42%	44%	14%
↑	UAE	36%	42%	22%
	Saudi Arabia	35%	40%	25%
↓	Chile	35%	48%	17%
	USA	28%	35%	37%
↑	Thailand	26%	36%	38%
↑	Kazakhstan	25%	44%	31%
↑	Sri Lanka	24%	45%	31%
↓	Mexico	23%	42%	35%
↓	Egypt	22%	45%	33%
	Cambodia	13%	27%	59%

■ Safe　■ Unsure　■ Unsafe
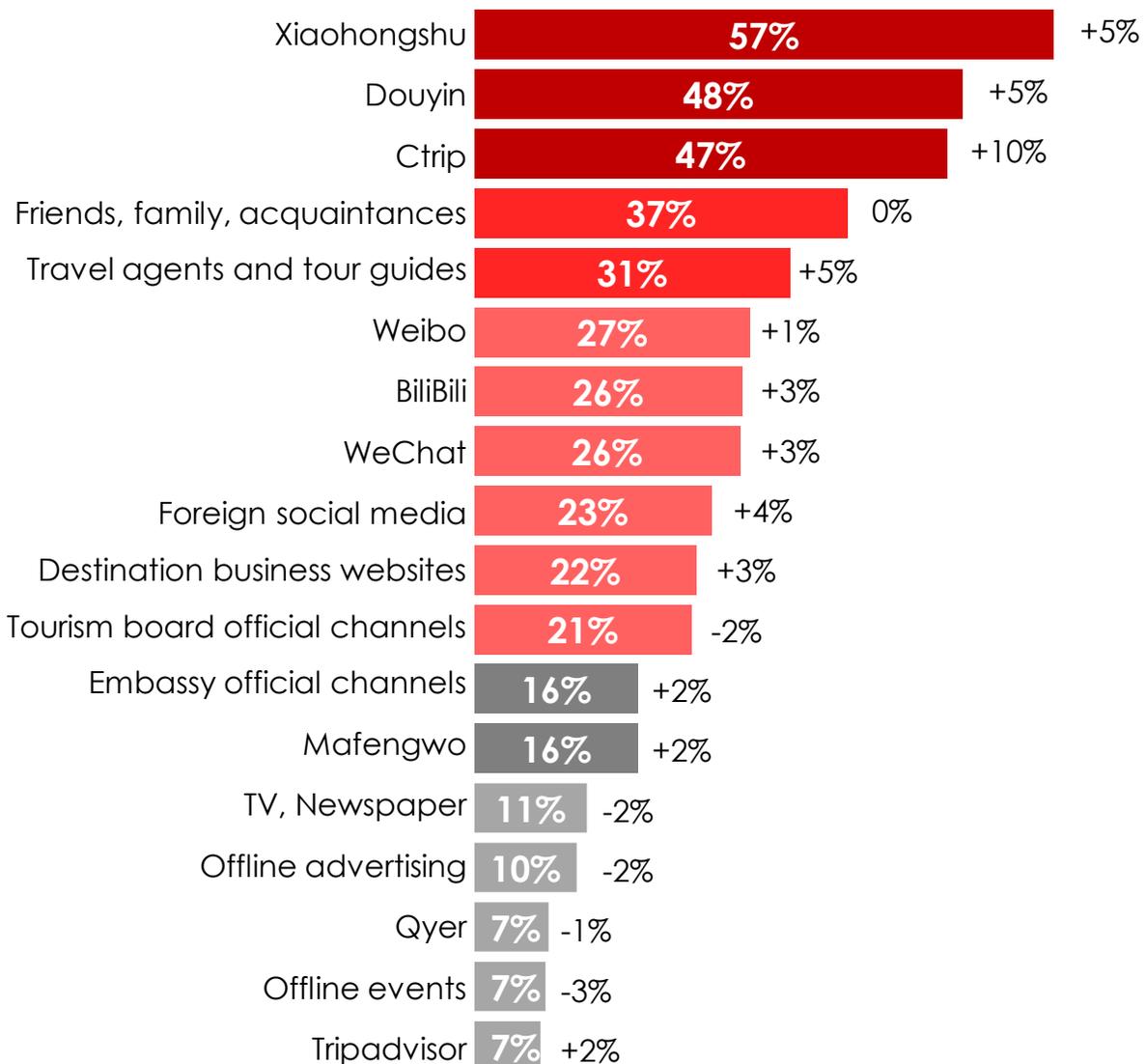
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Xiaohongshu continues to gain prominence as a source of outbound travel information

Once again, Xiaohongshu tops the list of information channels for overseas travel destinations, now chosen by an impressive 57% of survey respondents. Short-video app Douyin has also gained in popularity, chosen by 48%, Ctrip saw a resurgence as a source of destination information, chosen by 47%. Offline channels are still influential, with friends, family, and acquaintances, and travel agents and tour guides getting 37% and 31%, respectively.

Chinese travelers: Channels used for destination information (N=1025)

vs. 2024 spring

Channel	%	vs. 2024 spring
Xiaohongshu	57%	+5%
Douyin	48%	+5%
Ctrip	47%	+10%
Friends, family, acquaintances	37%	0%
Travel agents and tour guides	31%	+5%
Weibo	27%	+1%
BiliBili	26%	+3%
WeChat	26%	+3%
Foreign social media	23%	+4%
Destination business websites	22%	+3%
Tourism board official channels	21%	-2%
Embassy official channels	16%	+2%
Mafengwo	16%	+2%
TV, Newspaper	11%	-2%
Offline advertising	10%	-2%
Qyer	7%	-1%
Offline events	7%	-3%
Tripadvisor	7%	+2%

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Chinese consumers are looking for practical information to improve their outbound trips

Favorable policies and promotional offers, such as visa-free policies and travel coupons for hotels, are the most attractive types of content sought out by travelers (60%). Content about travel experiences by fellow tourists ranks second, with 57% of consumers choosing this. 52% of survey respondents prefer practical destination information, such as itinerary recommendations. Content shared by travel influencers (KOLs) is also influential, chosen by 48% of survey respondents.

Which of the following content most interests you for a particular overseas destination?
(N=1025)

Favorable policies and promotional offers, 60%

Travel tips/experience sharing by other travelers, 57%

Pratical destination information such as itinerary/hotel recommendations, 52%

Travel sharing by travel influencers (KOLs), 48%

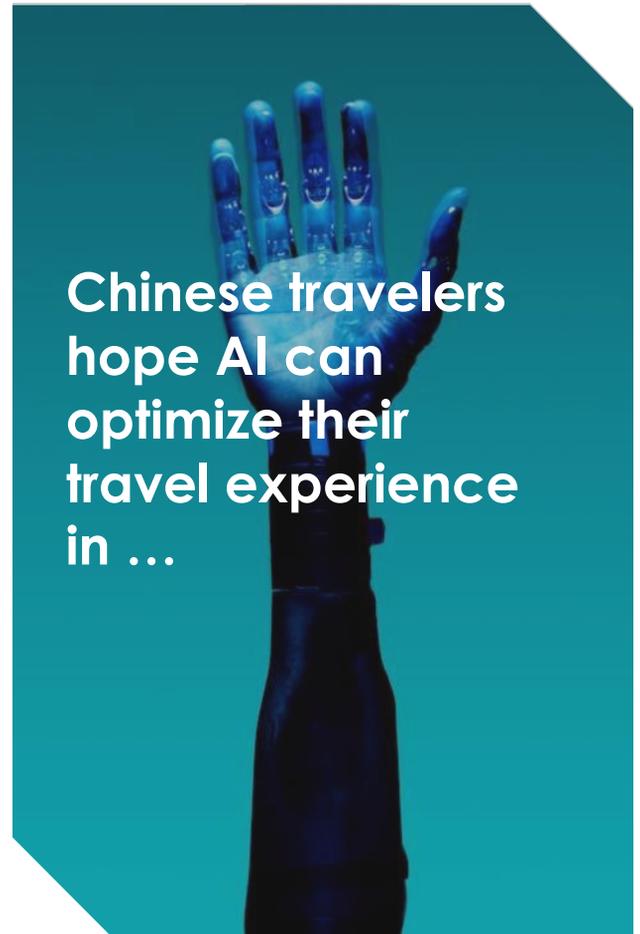**Marketing campaigns leveraging Chinese internet hotspots, 38%**

Daily life sharing by local residents, 38%

Collaboration with celebrities, 15%

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Chinese travelers hope AI can assist them with translation and itinerary planning

What do Chinese travelers think about the potential of artificial intelligence (AI) to improve travel? Our survey respondents remain reserved, with 15% saying they do not believe AI will enhance the experience of traveling abroad. 51% think currently it is not useful enough, and 25% are uncertain. Just 10% are optimistic about the future of AI or have already experienced its usefulness. Chinese travelers hope that AI can assist them with language translation (73%), followed by itinerary planning (67%).

Chinese travelers: Attitudes on AI travel assistants/functions (N=1025)

15%	51%	25%	5%	5%
● I do not believe in its usefulness	● Currently not useful enough	● Not quite clear	● Optimistic about its future	● Already helped me

73%
Language translation

67%
Itinerary planning

64%
Train/hotel/restaurant reservations

62%
Safety early warning

58%
Hotel/restaurant recommendations

54%
Destination/activity recommendations

53%
Expense management

46%
Destination acculturation

Chinese travelers hope AI can optimize their travel experience in …

Photo from Pexels

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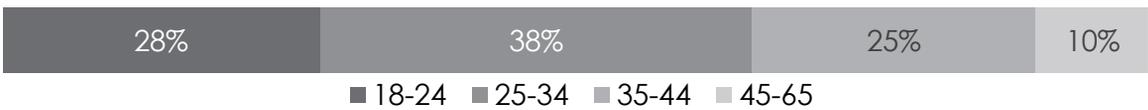
Methodology

From 12-20 August 2024, Dragon Trail Research conducted a 43-question survey on the overall sentiment of mainland Chinese travelers, using Tencent's survey panel. Our data cleaning process identified and removed invalid responses, resulting in a total of 1,025 valid responses.

Respondent age, gender, and city of residence were controlled with quotas to reflect market distribution status.
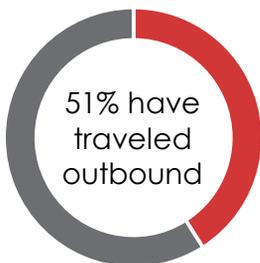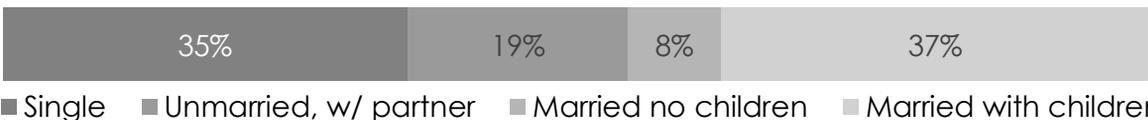
Age

28%	38%	25%	10%

■ 18-24 ■ 25-34 ■ 35-44 ■ 45-65

Gender

50%	50%

■ Male ■ Female

City of residence

53%	38%	9%

■ Tier 1 & New Tier 1 ■ Tier 2 ■ Tier 3 and below

Education

12%	60%	22%	7%

■ Master degree+ ■ Bachelor degree ■ Professional degree ■ High school/other

Monthly salary (RMB)

20%	21%	30%	18%	12%

■ Above 25k ■ 20-25k ■ 12-20k ■ 8-12k ■ 0-8k

Family

35%	19%	8%	37%

■ Single ■ Unmarried, w/ partner ■ Married no children ■ Married with children

51% have traveled outbound

All survey respondents had interest in outbound travel. 51% had previously traveled outbound.

Age of Children

12 and under	67%
13-17	17%
18+	16%

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What is your budget for your next outbound trip (RMB)?
(N=1025)

Budget	August 2024	Spring 2024
<10k	19%	22%
10k-30k	49%	47%
30k-50k	24%	22%
50k-100k	6%	8%
>100k	2%	2%

■ August 2024   ■ Spring 2024
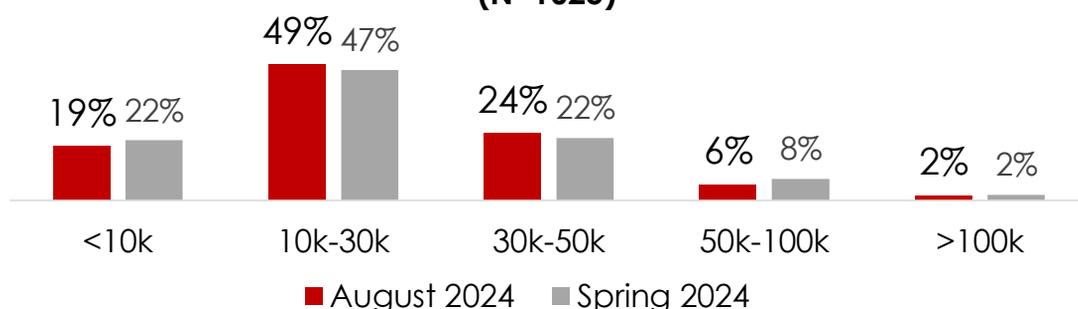
When did you take your most recent 2024 outbound trip? (N=160)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
4%	4%	15%	20%	21%	13%	18%	5%
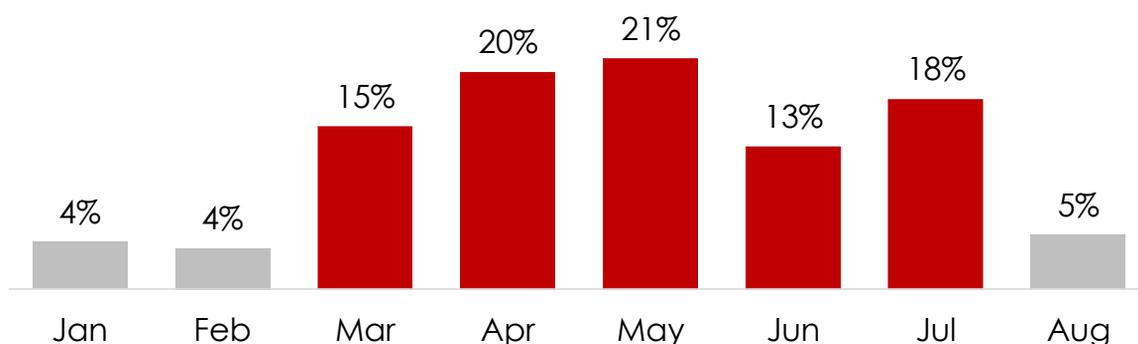
When do you plan to travel outbound during the rest of 2024? (N=633)

Aug	Sep	Oct	Nov	Dec	Undecided
2%	7%	38%	16%	16%	22%

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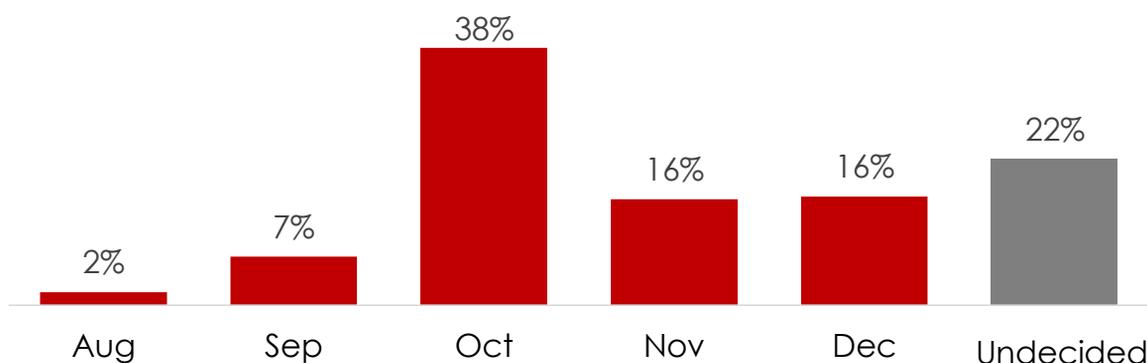
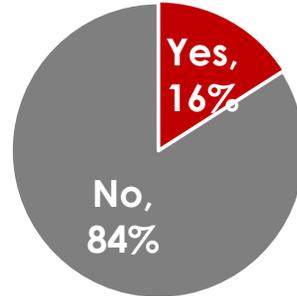# Appendix B

Brands of last outbound cruise trip

DREAM CRUISES
MSC CRUISES
VIKING CRUISES
ROYAL CARIBBEAN CRUISES
COSTA CRUISES
PRINCESS CRUISE
RESORTS WORLD CRUISES

Itineraries of last outbound cruise trip

OKINAWA
HONG KONG
NETHERLANDS-FRANCE
THAILAND
SOUTH KOREA
MEDITERRANEAN SHANGHAI-FUKUOKA
PHUKET
LOS ANGELES
SHANGHAI-OMAN
SHENZHEN-SOUTH KOREA
SEOUL
SHANGHAI-JAPAN
ITALY
JEJU ISLAND
PHILIPPINES
AUSTRIA
NETHERLANDS-USA
JAPAN
ISTANBUL, TURKEY
FLORIDA
LIVERPOOL
ROME
PHUKET ISLAND
SHANGHAI-KUMAMOTO-KAGOSHIMA
SINGAPORE-MALAYSIA-THAILAND
JAPAN-SOUTH KOREA
MACAU SINGAPORE
BANGKOK
SIMILAN
EUROPE
CARIBBEAN SEA NORTH AMERICA

Are you a member of a hotel's loyalty program?
(N=1025)

Yes, 16%

No, 84%

Attractive hotel membership incentives

	Loyalty members	Consumers not signed up for a hotel loyalty scheme
Exclusive discount	73%	68%
Late check-out	58%	56%
Online Room Selection	57%	55%
Points Redemption for Hotel stay	54%	43%
Free Internet access	37%	34%
Electronic room card	20%	21%

Which hotel's loyalty program have you joined?

MARRIOTT
HOME INNS
VIENNA HOTEL
HILTON
IHG
CROWNE PLAZA   JINJIANG HOTEL   JINJIANG HOTEL
HANTING HOTEL   H WORLD
SHANGRI-LA   ATOUR HOTEL   JI HOTEL
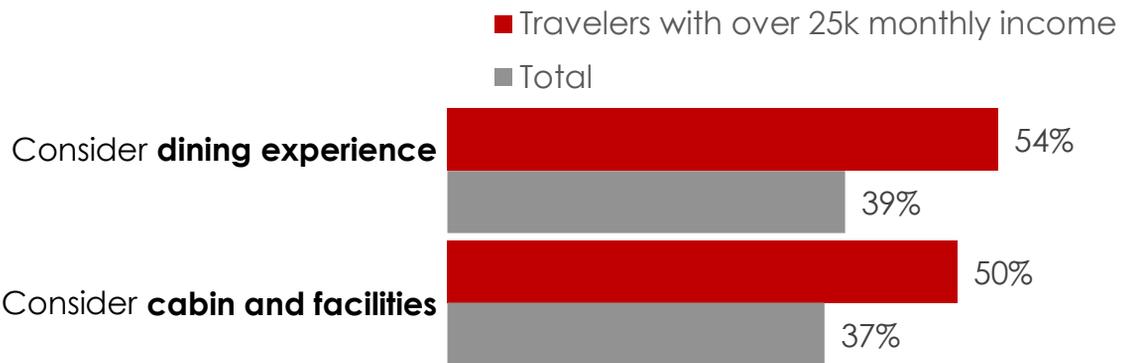
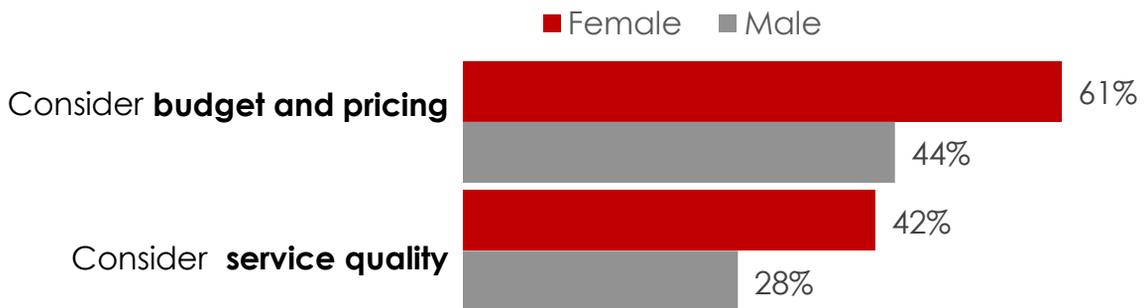Dragon Trail
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Appendix D

Other insights related to this research:

◆ **Important factors when considering cruise travel products**

Chinese trav**elers with over 25k monthly income are more likely than average to …**

Legend:
- ■ Travelers with over 25k monthly income
- ■ Total

Consider **dining experience**
- 54%
- 39%

Consider **cabin and facilities**
- 50%
- 37%

Female travelers are more likely than male travelers to …

Legend: ■ Female ■ Male

Consider **budget and pricing**
- 61%
- 44%

Consider **service quality**
- 42%
- 28%

Male travelers are more likely than female travelers to …

Legend: ■ Male ■ Female

Consider **dining experience**
- 44%
- 34%

Consider **onboard activities and entertainment**
- 46%
- 24%

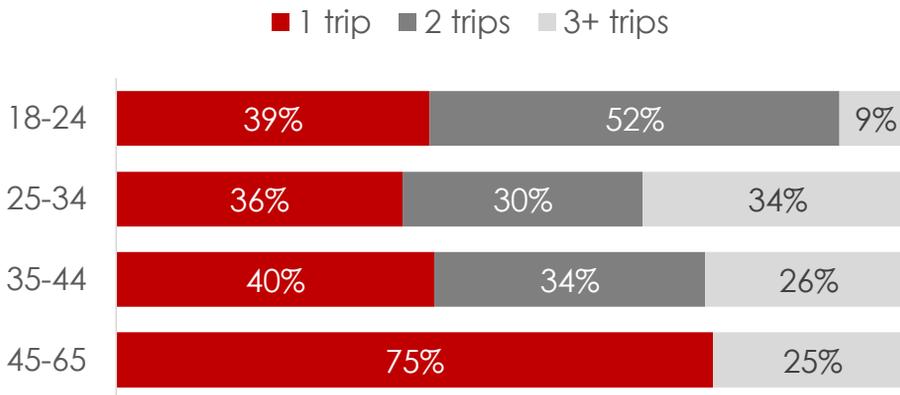Dragon Trail INTERNATIONAL
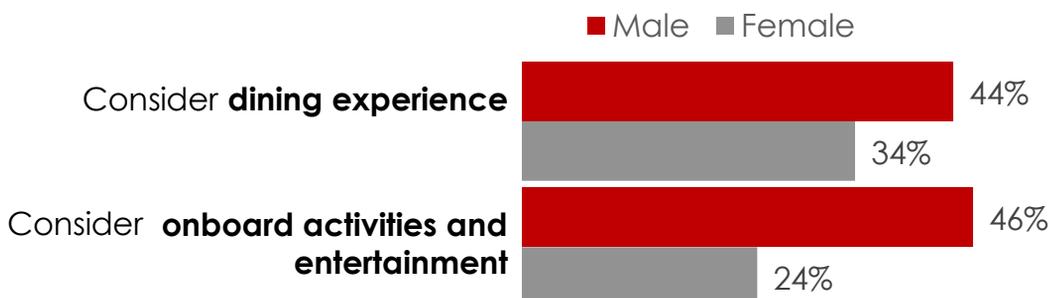
Appendix E

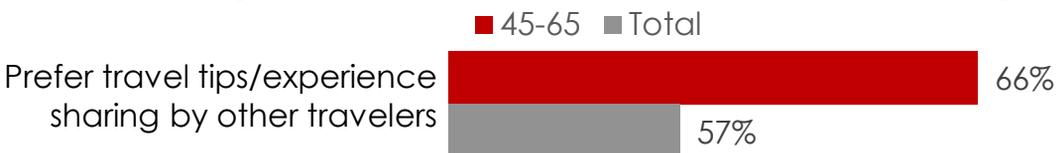## Other insights related to this research:

◆ Active outbound travel age group

Among survey respondents who have traveled abroad in 2024, **half of the travelers aged 18-24** have made **two outbound trips**, while the **25-34 age group** has the highest number of travelers who have made **three or more outbound trips**.

Legend: ■ 1 trip ■ 2 trips ■ 3+ trips

Age	1 trip	2 trips	3+ trips
18-24	39%	52%	9%
25-34	36%	30%	34%
35-44	40%	34%	26%
45-65	75%		25%

◆ Age differences in preferences for marketing content

Travelers aged 45-65 are more likely than average to …

Legend: ■ 45-65 ■ Total

Prefer travel tips/experience sharing by other travelers
- 45-65: 66%
- Total: 57%

Travelers aged 25-34 are more likely than average to …

Legend: ■ 25-34 ■ Total

Prefer practical destination information
- 25-34: 57%
- Total: 52%

Travelers aged 18-24 are more likely than average to …

Legend: ■ 18-24 ■ Total

Prefer travel sharing by travel influencers (KOLs)
- 18-24: 55%
- Total: 48%

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ABOUT DRAGON TRAIL RESEARCH

Dragon Trail Research empowers decision-making for the travel industry. Founded in 2019, Dragon Trail Research delivers quantitative and qualitative research fueled by statistics to help our clients uncover market trends, evaluate tactics, and engage their target audience.

SERVICES WE PROVIDE

- Traveler Sentiment Analysis
- Awareness & Satisfaction Studies
- Competitor Analysis
- Travel Trade Surveys
- Customized Research

To discuss cooperation and partnerships, contact:
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